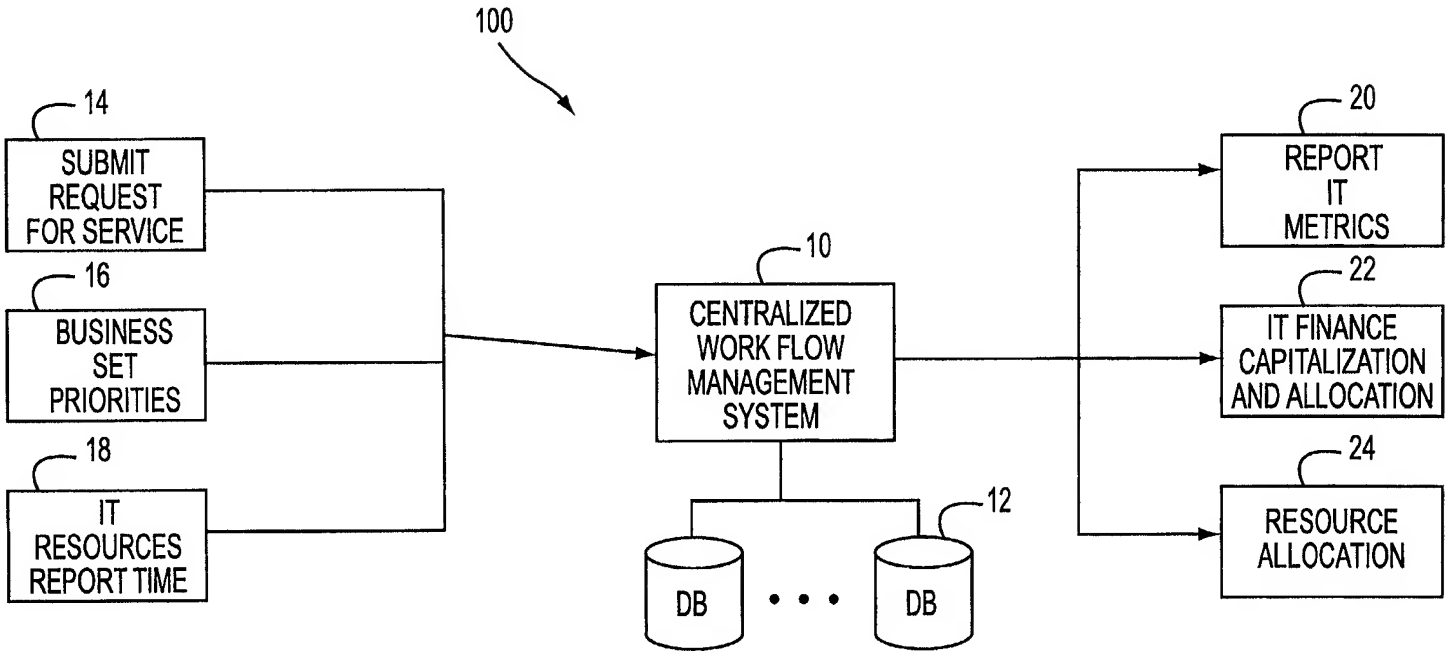
100
14
SUBMIT REQUEST FOR SERVICE
16
BUSINESS SET PRIORITIES
18
IT RESOURCES REPORT TIME
10
CENTRALIZED WORK FLOW MANAGEMENT SYSTEM
12
DB
DB
20
REPORT IT METRICS
22
IT FINANCE CAPITALIZATION AND ALLOCATION
24
RESOURCE ALLOCATION

FIG. 1

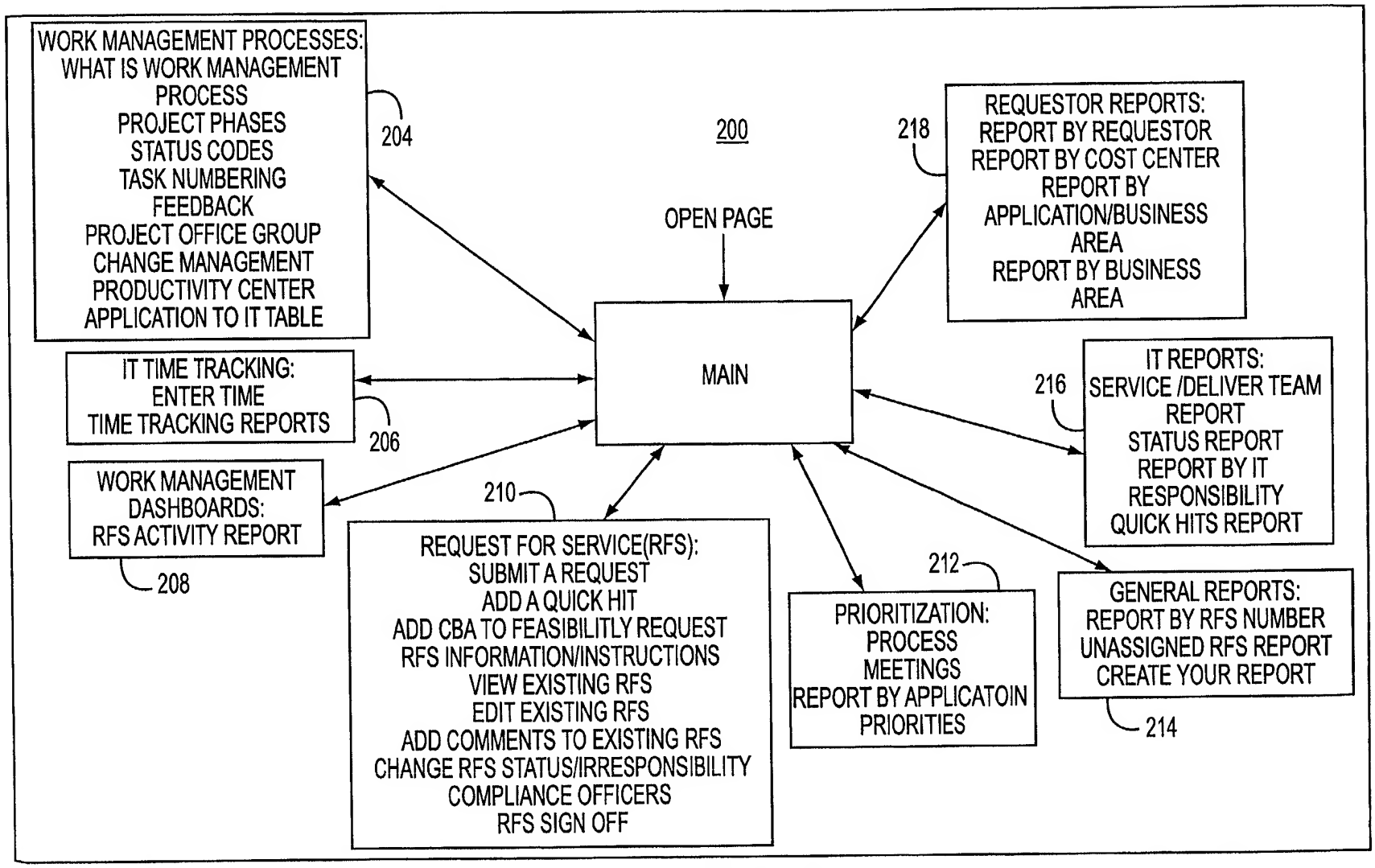
WORK MANAGEMENT PROCESSES:
WHAT IS WORK MANAGEMENT
PROCESS
PROJECT PHASES
STATUS CODES
TASK NUMBERING
FEEDBACK
PROJECT OFFICE GROUP
CHANGE MANAGEMENT
PRODUCTIVITY CENTER
APPLICATION TO IT TABLE
204
200
OPEN PAGE
218
REQUESTOR REPORTS:
REPORT BY REQUESTOR
REPORT BY COST CENTER
REPORT BY
APPLICATION/BUSINESS
AREA
REPORT BY BUSINESS
AREA
IT TIME TRACKING:
ENTER TIME
TIME TRACKING REPORTS
206
MAIN
216
IT REPORTS:
SERVICE /DELIVER TEAM
REPORT
STATUS REPORT
REPORT BY IT
RESPONSIBILITY
QUICK HITS REPORT
WORK MANAGEMENT
DASHBOARDS:
RFS ACTIVITY REPORT
208
210
REQUEST FOR SERVICE(RFS):
SUBMIT A REQUEST
ADD A QUICK HIT
ADD CBA TO FEASIBILITLY REQUEST
RFS INFORMATION/INSTRUCTIONS
VIEW EXISTING RFS
EDIT EXISTING RFS
ADD COMMENTS TO EXISTING RFS
CHANGE RFS STATUS/IRRESPONSIBILITY
COMPLIANCE OFFICERS
RFS SIGN OFF
212
PRIORITIZATION:
PROCESS
MEETINGS
REPORT BY APPLICATOIN
PRIORITIES
GENERAL REPORTS:
REPORT BY RFS NUMBER
UNASSIGNED RFS REPORT
CREATE YOUR REPORT
214

FIG. 2

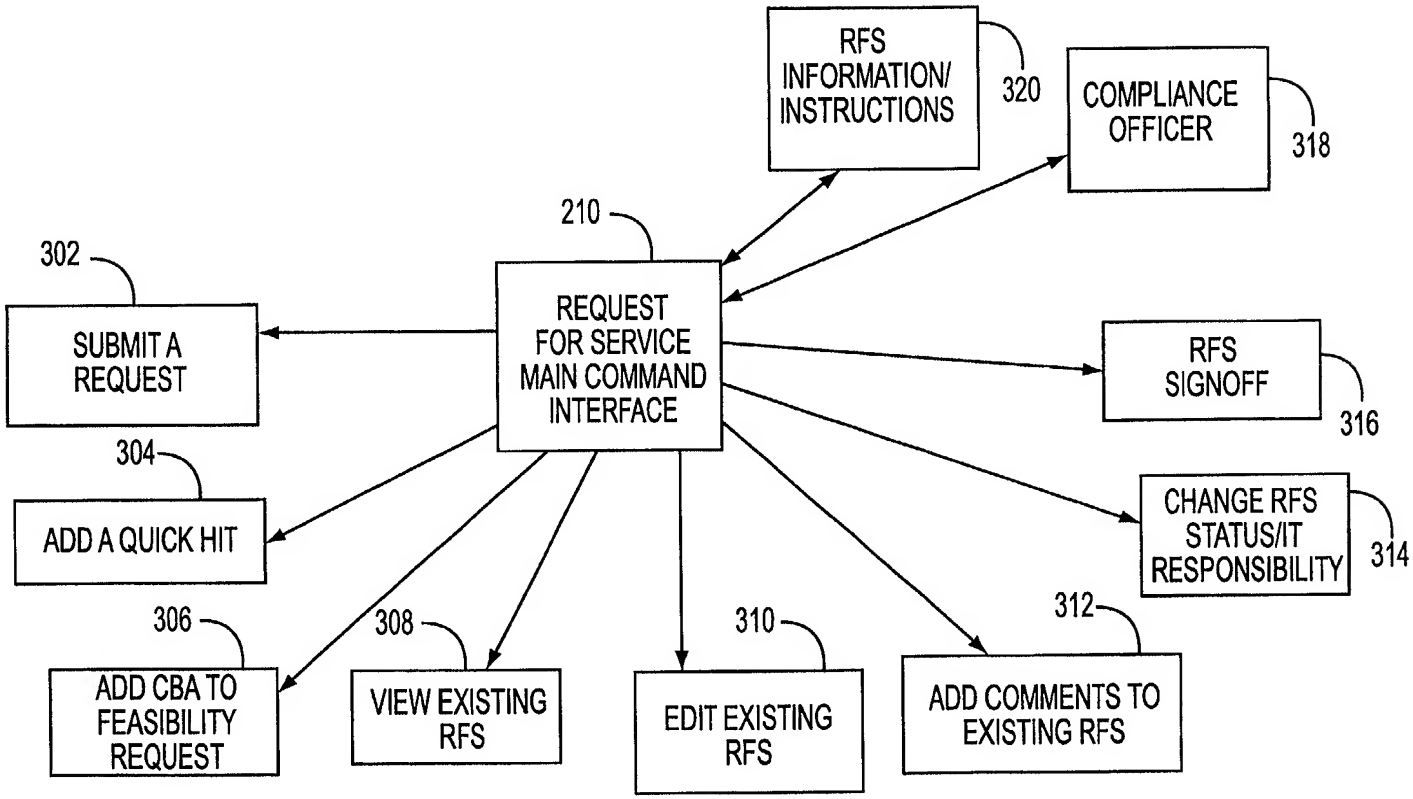
RFS INFORMATION/ INSTRUCTIONS
320
COMPLIANCE OFFICER
318
210
302
SUBMIT A REQUEST
REQUEST FOR SERVICE MAIN COMMAND INTERFACE
RFS SIGNOFF
316
304
ADD A QUICK HIT
CHANGE RFS STATUS/IT RESPONSIBILITY
314
306
308
310
312
ADD CBA TO FEASIBILITY REQUEST
VIEW EXISTING RFS
EDIT EXISTING RFS
ADD COMMENTS TO EXISTING RFS

FIG. 3

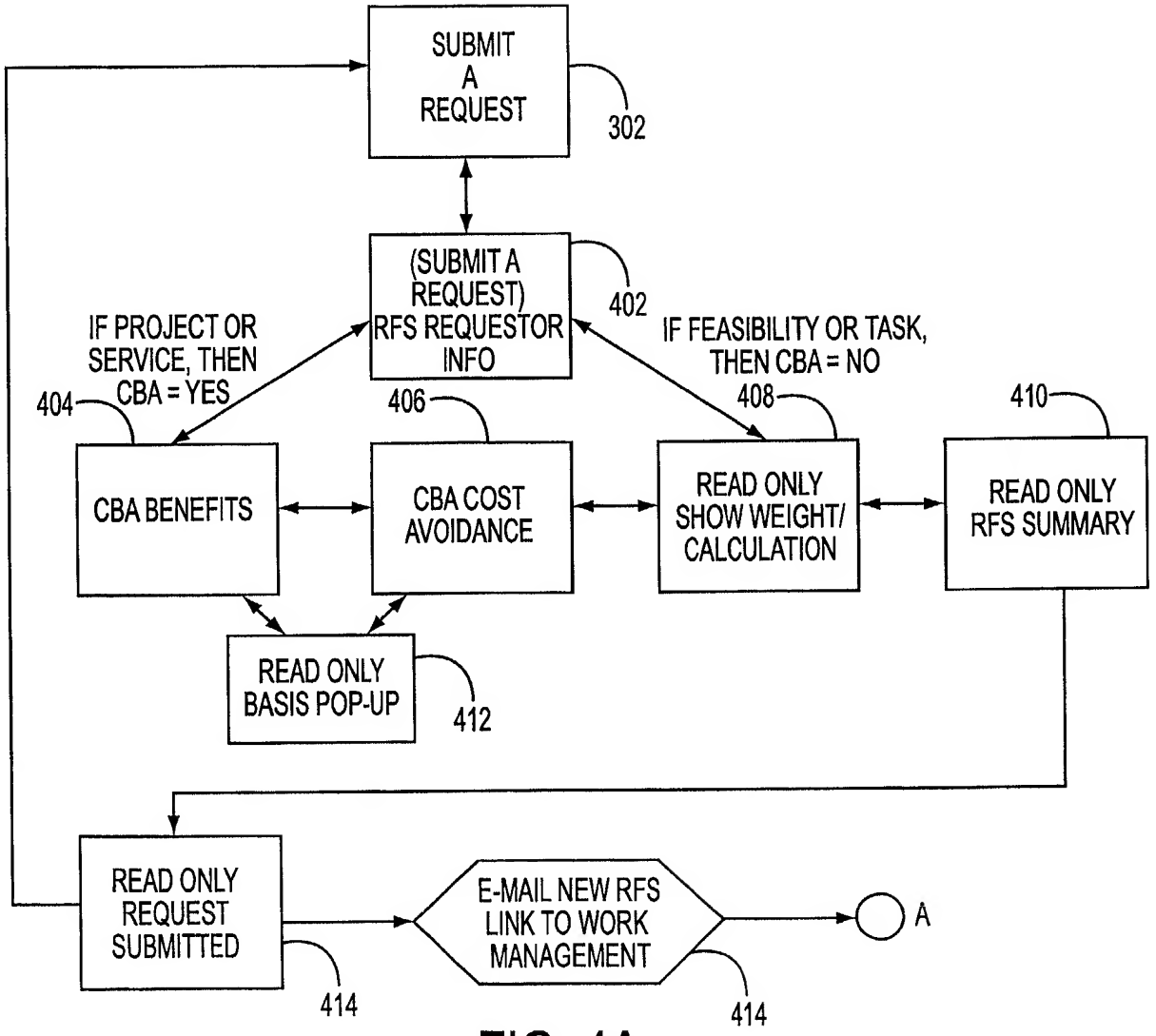
SUBMIT A REQUEST
302
(SUBMIT A REQUEST) RFS REQUESTOR INFO
402
IF PROJECT OR SERVICE, THEN CBA = YES
404
IF FEASIBILITY OR TASK, THEN CBA = NO
408
406
410
CBA BENEFITS
CBA COST AVOIDANCE
READ ONLY SHOW WEIGHT/ CALCULATION
READ ONLY RFS SUMMARY
READ ONLY BASIS POP-UP
412
READ ONLY REQUEST SUBMITTED
414
E-MAIL NEW RFS LINK TO WORK MANAGEMENT
414
A

FIG. 4A

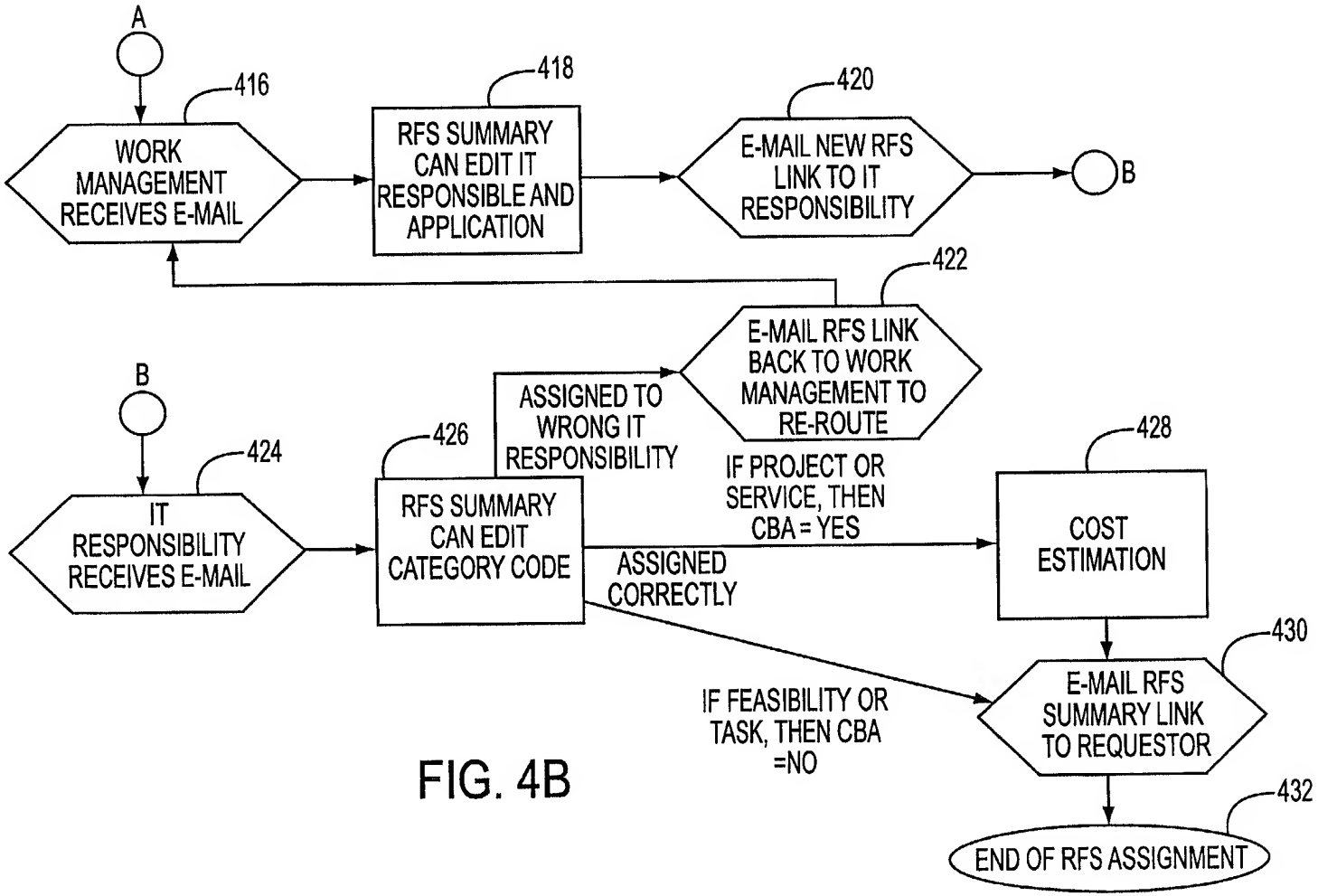
A
416
WORK MANAGEMENT RECEIVES E-MAIL
418
RFS SUMMARY CAN EDIT IT RESPONSIBLE AND APPLICATION
420
E-MAIL NEW RFS LINK TO IT RESPONSIBILITY
B
422
E-MAIL RFS LINK BACK TO WORK MANAGEMENT TO RE-ROUTE
B
424
IT RESPONSIBILITY RECEIVES E-MAIL
426
RFS SUMMARY CAN EDIT CATEGORY CODE
ASSIGNED TO WRONG IT RESPONSIBILITY
IF PROJECT OR SERVICE, THEN CBA = YES
ASSIGNED CORRECTLY
428
COST ESTIMATION
IF FEASIBILITY OR TASK, THEN CBA =NO
430
E-MAIL RFS SUMMARY LINK TO REQUESTOR
432
END OF RFS ASSIGNMENT

FIG. 4B

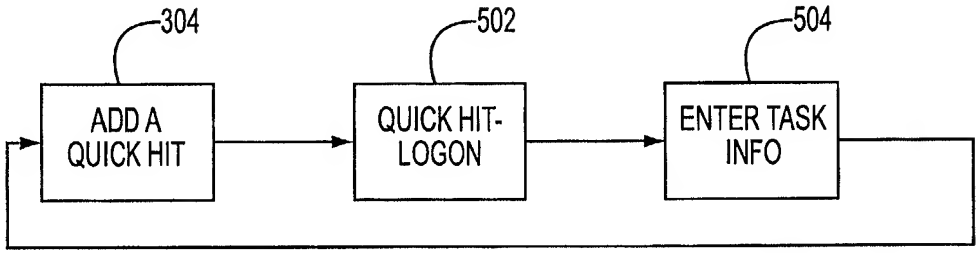

FIG. 5

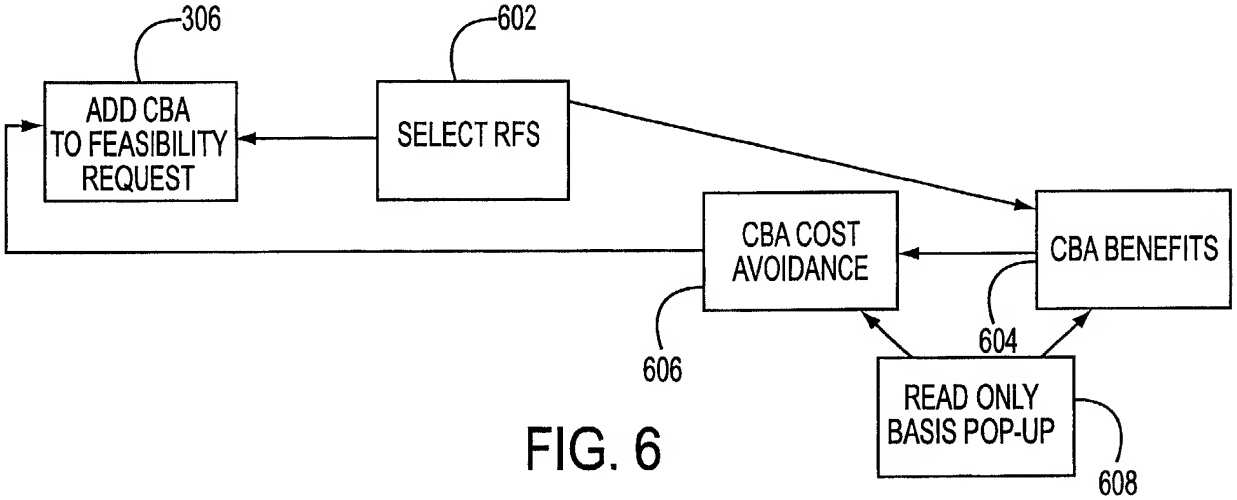

FIG. 6

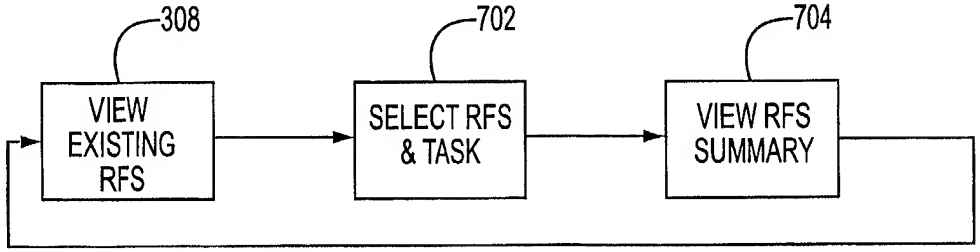

FIG. 7

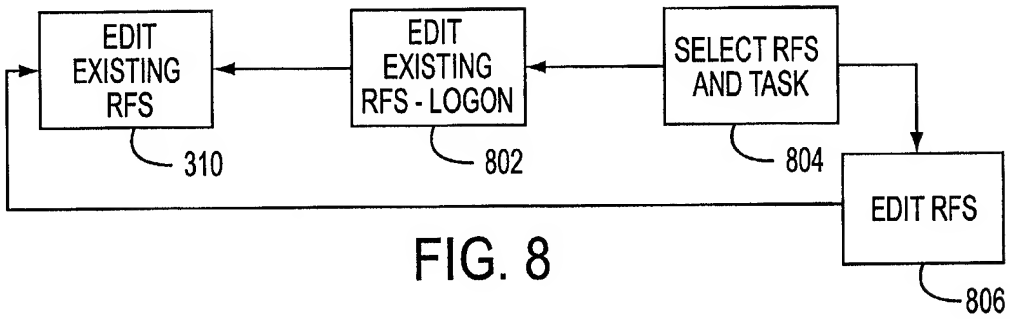

FIG. 8

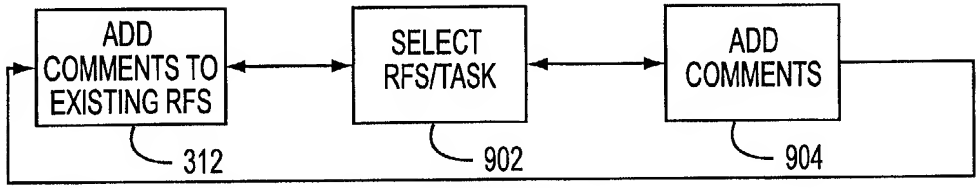

FIG. 9

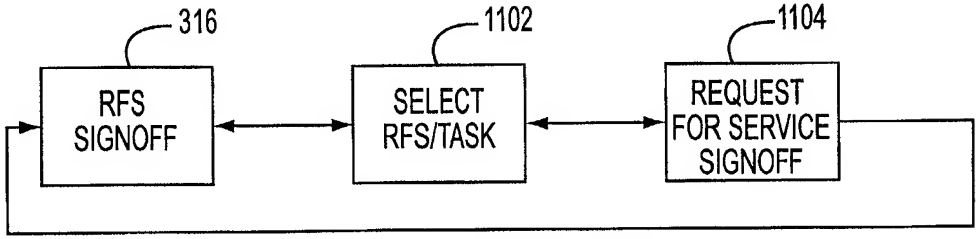

FIG. 11

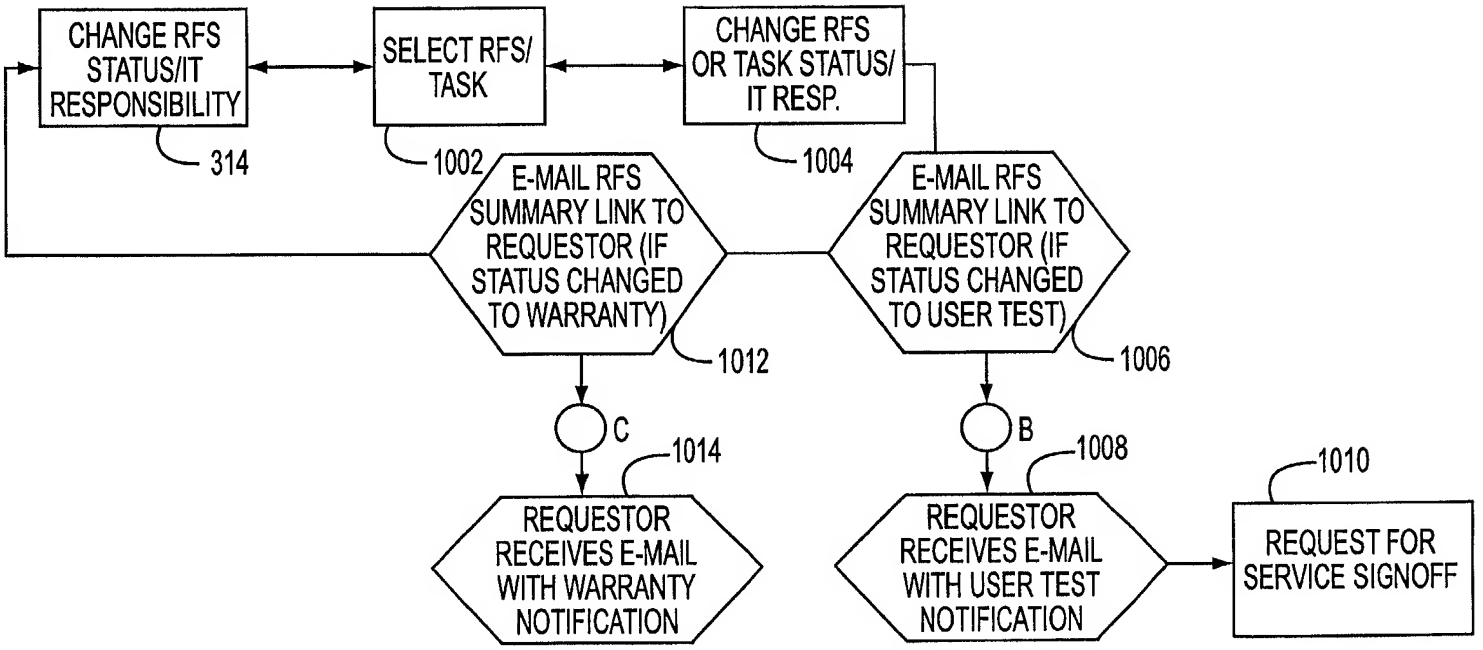
CHANGE RFS STATUS/IT RESPONSIBILITY
314
SELECT RFS/ TASK
1002
CHANGE RFS OR TASK STATUS/ IT RESP.
1004
E-MAIL RFS SUMMARY LINK TO REQUESTOR (IF STATUS CHANGED TO WARRANTY)
1012
E-MAIL RFS SUMMARY LINK TO REQUESTOR (IF STATUS CHANGED TO USER TEST)
1006
C
1014
B
1008
1010
REQUESTOR RECEIVES E-MAIL WITH WARRANTY NOTIFICATION
REQUESTOR RECEIVES E-MAIL WITH USER TEST NOTIFICATION
REQUEST FOR SERVICE SIGNOFF

FIG. 10

Request for Service

RFS #		TASK #	

Items to be completed by REQUESTOR:

Bus. Cost Center		Requestor		Phone #	
Site Code		Req. Department		Fax #	
Business Critical Date		Reason			

Request Type:	Feasibility		Project		Service		Express Lane	
Short Description		Task		Code Move		New Product	

Describe the requirements for this request:

Application Name		Attachments to be Forwarded	

At a strategic level, explain what this request is intended to accomplish for the business:

Request Category:	DV		PC		EN	X	MM		SE		MC		TC	
	AR		IR											

Total Cost Estimate		Total Benefit Estimate	
Amount	$0	Amount	$0
Request Weight	0		

Approval - Department Manager

Manager		Date	

Items to be completed by IT WORK MANAGEMENT:

Date Received	Short Name	Application Code

Team	IT Responsibility	Extension	Cost Center

FIG. 12

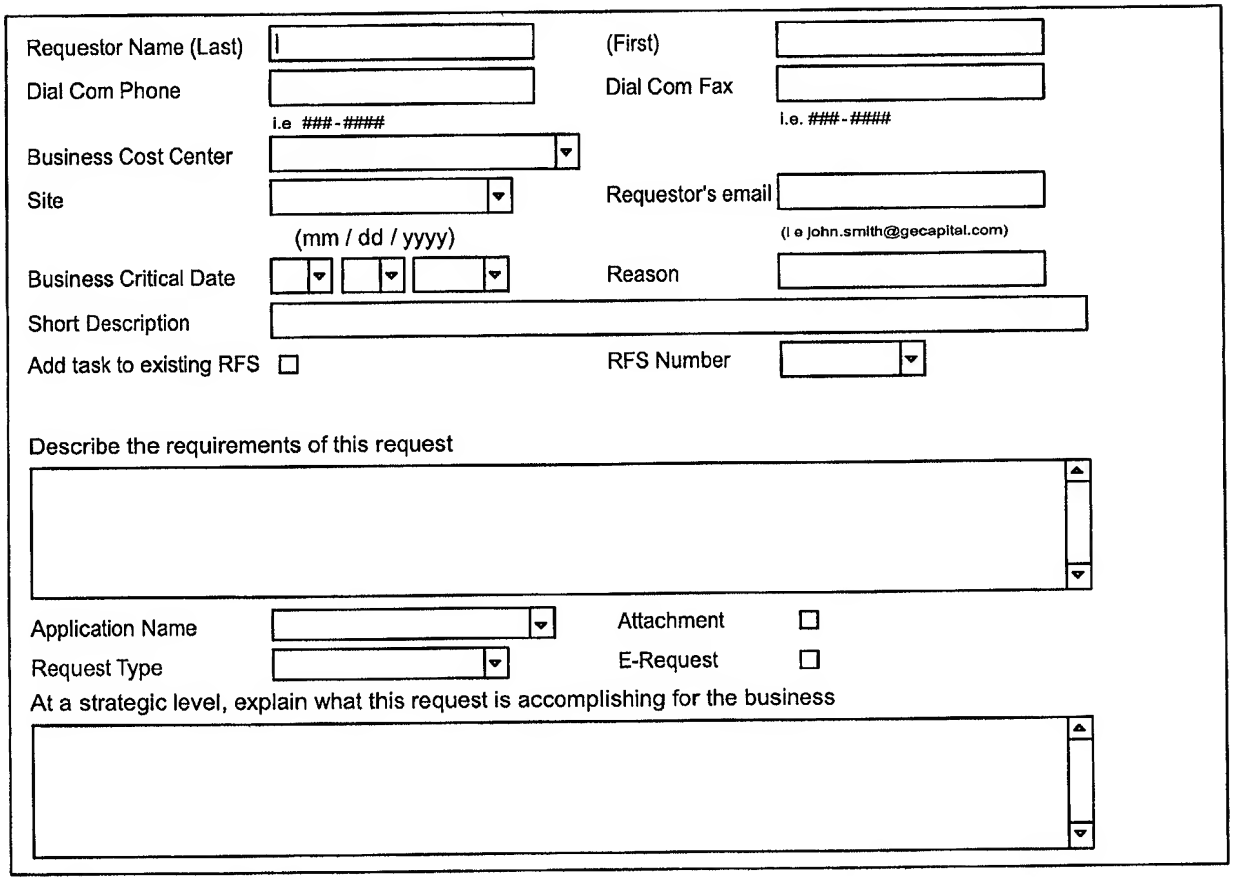
Requestor Name (Last)
(First)
Dial Com Phone
Dial Com Fax
i.e ###-####
i.e. ###-####
Business Cost Center
Site
Requestor's email
(mm / dd / yyyy)
(I e john.smith@gecapital.com)
Business Critical Date
Reason
Short Description
Add task to existing RFS
RFS Number
Describe the requirements of this request
Application Name
Attachment
Request Type
E-Request
At a strategic level, explain what this request is accomplishing for the business

FIG. 13A

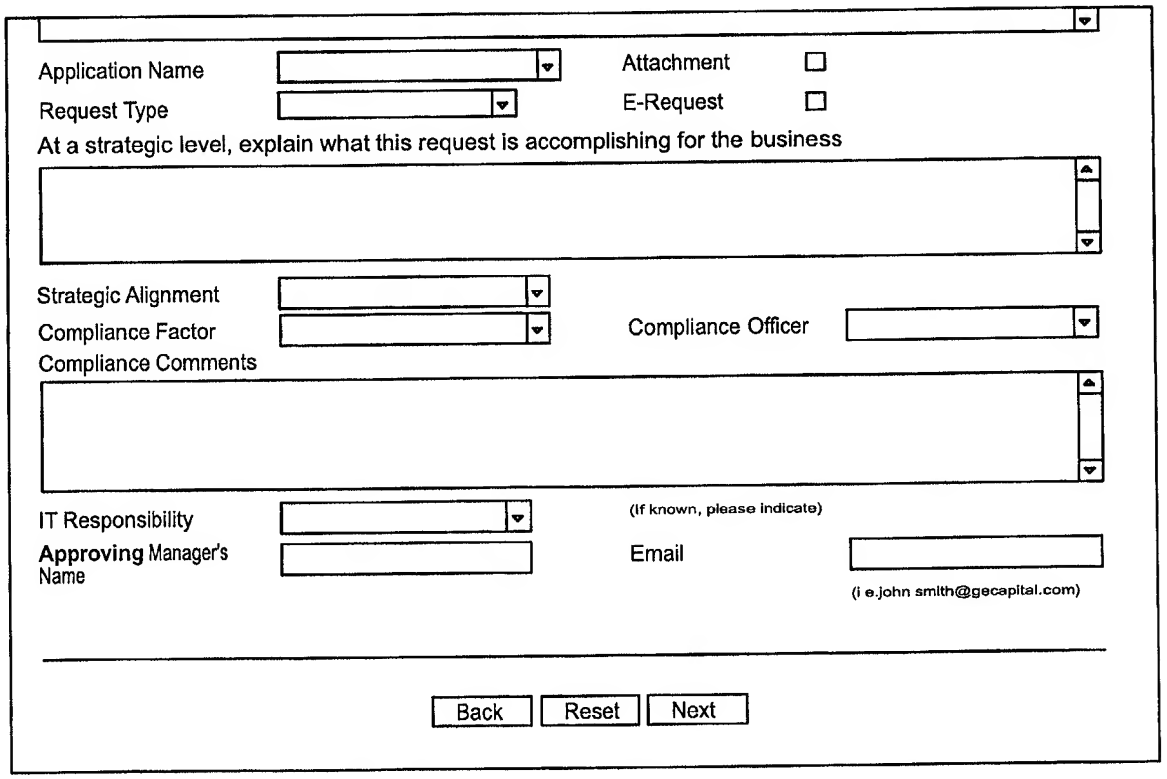
Application Name
Attachment
Request Type
E-Request
At a strategic level, explain what this request is accomplishing for the business
Strategic Alignment
Compliance Factor
Compliance Officer
Compliance Comments
IT Responsibility
(If known, please indicate)
Approving Manager's Name
Email
(i e.john smith@gecapital.com)
Back
Reset
Next

FIG. 13B

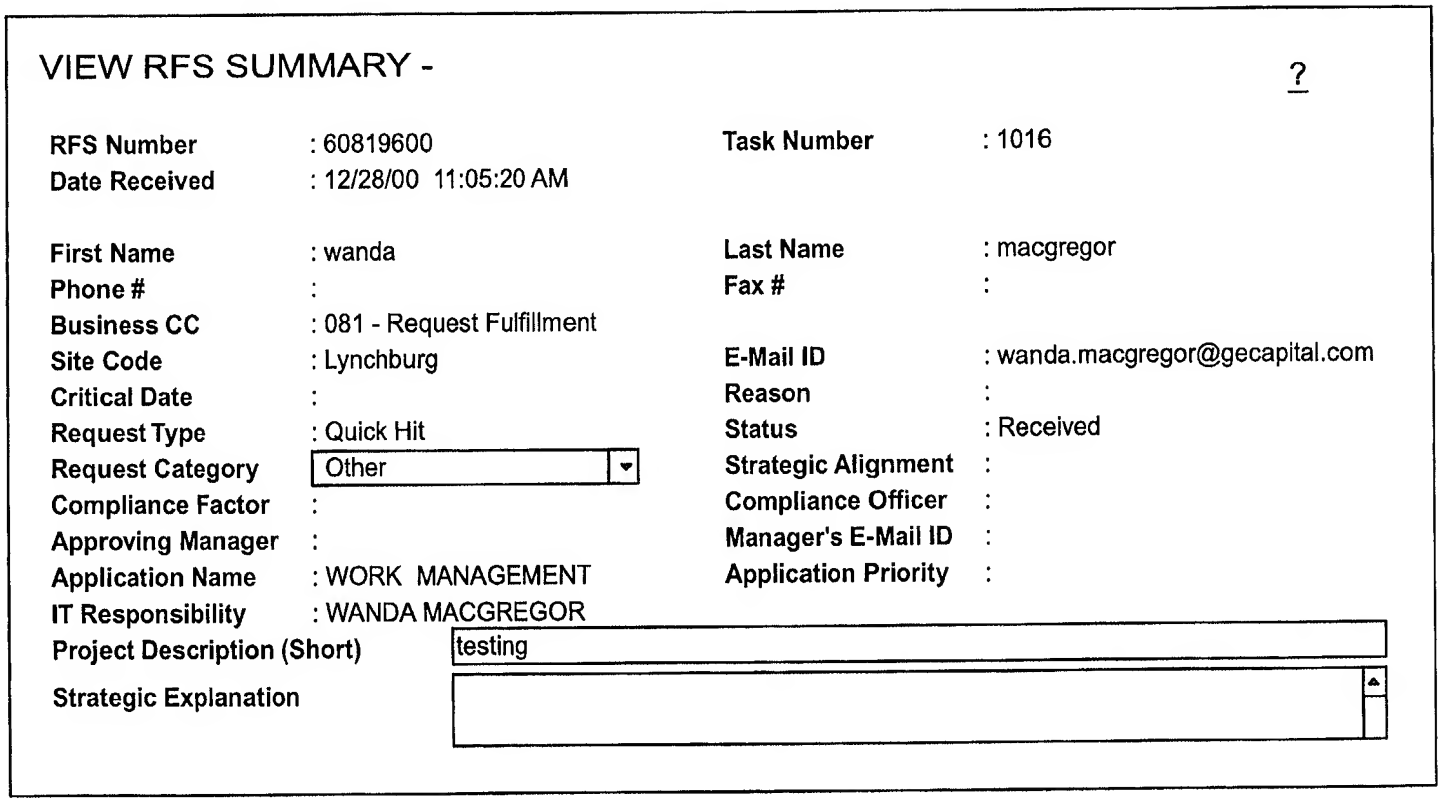
VIEW RFS SUMMARY -
?
RFS Number : 60819600
Date Received : 12/28/00 11:05:20 AM
Task Number : 1016
First Name : wanda
Phone # :
Business CC : 081 - Request Fulfillment
Site Code : Lynchburg
Critical Date :
Request Type : Quick Hit
Request Category Other
Compliance Factor :
Approving Manager :
Application Name : WORK MANAGEMENT
IT Responsibility : WANDA MACGREGOR
Last Name : macgregor
Fax # :
E-Mail ID : wanda.macgregor@gecapital.com
Reason :
Status : Received
Strategic Alignment :
Compliance Officer :
Manager's E-Mail ID :
Application Priority :
Project Description (Short) testing
Strategic Explanation

FIG. 14

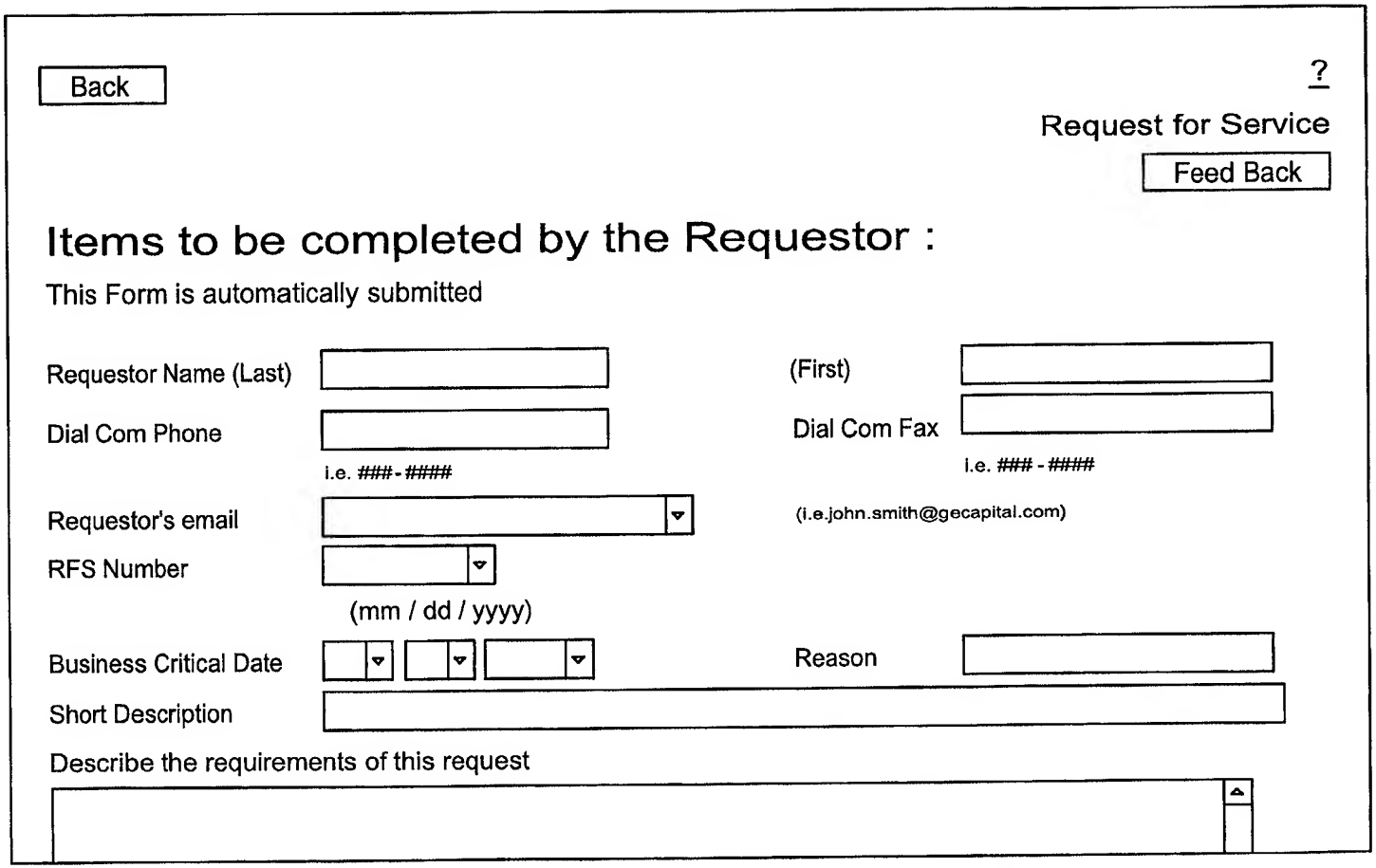
Back
?
Request for Service
Feed Back
Items to be completed by the Requestor :
This Form is automatically submitted
Requestor Name (Last)
(First)
Dial Com Phone
Dial Com Fax
i.e. ###-####
i.e. ### - ####
Requestor's email
(i.e.john.smith@gecapital.com)
RFS Number
(mm / dd / yyyy)
Business Critical Date
Reason
Short Description
Describe the requirements of this request

FIG. 15

Back

?

Net Income Benefits

(Enter ONLY numeric values in the 1st Year without commas or decimals.)
(If Other is checked then Basis Points have to be entered.)
(The text boxes under 1st Year are EDITABLE.)

	Increased Revenues	1st Year	10 Year NPV
☐	Variable Annuity	$	$
☐	Variable Life-Single Premium	$	$
☐	Variable Life-Annual Premium	$	$
☐	Fixed Annuity	$	$
☐	GIC	$	$
☐	Term	$	$
☐	Universal Life	$	$
☐	Retirement Annuity	$	$
☐	Structured Annuity	$	$
☐	Other (Please Specify Below)	$	$
	Total Impact on Net Income Due to Revenue		$
☐	Cost Reduction	$	$
	Total Net Income Benefit		$
	First Year Impact on Net Income		$

FIG. 16

VIEW RFS SUMMARY -

RFS Number	: 61100001		
First Name	: Anne-Patrick	**Last Name**	: Moehlankamp
Phone #	: 888-2917	**Fax #**	: 888-0000
Business CC	: 000 - CSIG Admin Group		
Site Code	: Richmond	**E-Mail ID**	: joy.taylor3@gecapital.com
Critical Date	: 12/29/00	**Reason**	: Mod to the CPG4 screen
Request Type	:		
Request Category	:	**Strategic Alignment**	:
Compliance Factor	:	**Compliance Officer**	:
Approving Manager	:	**Manager's E-Mail ID**	:
Application Name	: DISTRIBUTION SUPPORT		
IT Responsibility	:		

Project Description (Short): Mod to the CPG4 screen

Strategic Explanation:

Project Requirements: Modification to the CPG4 screen to display a + r - sign,

Compliance Comments:

FIG. 17

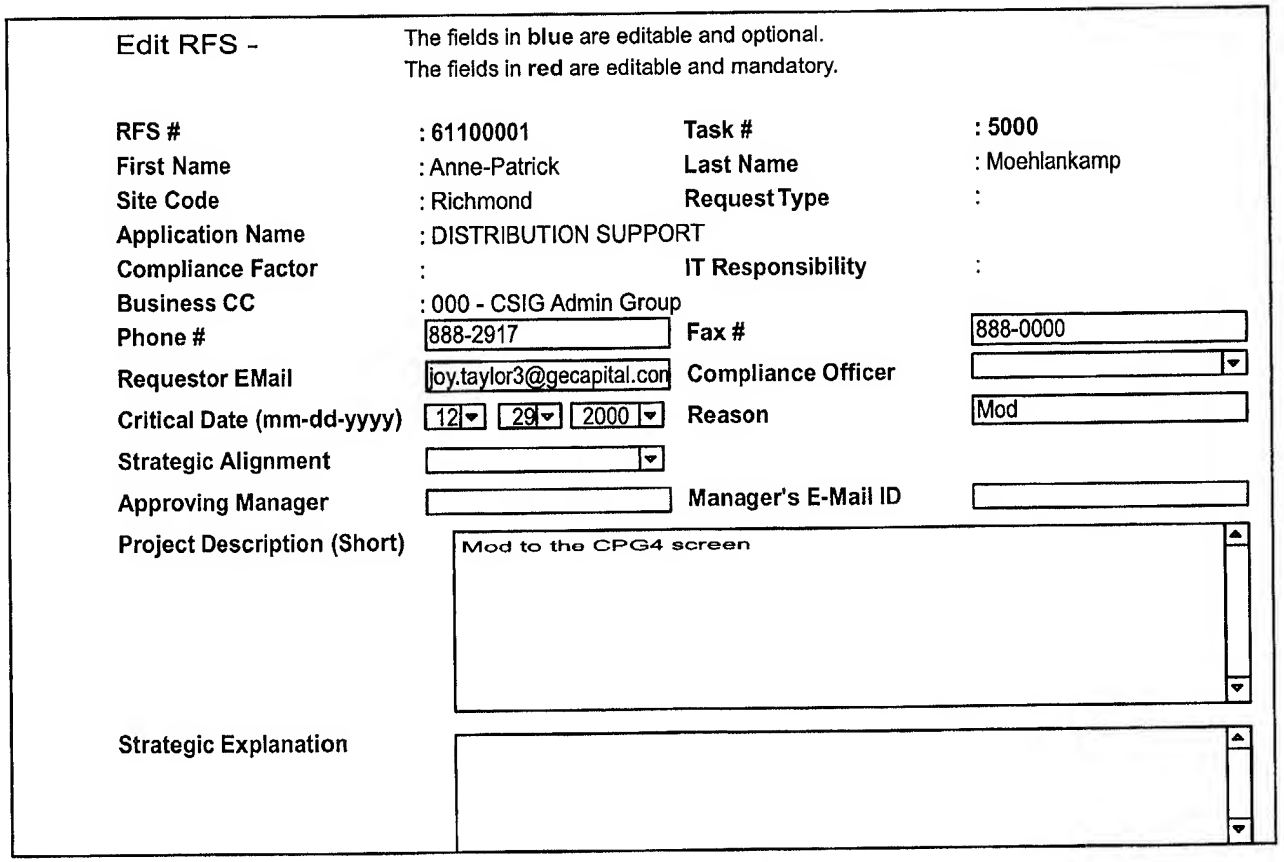
Edit RFS -
The fields in blue are editable and optional.
The fields in red are editable and mandatory.
RFS # : 61100001
Task # : 5000
First Name : Anne-Patrick
Last Name : Moehlankamp
Site Code : Richmond
Request Type :
Application Name : DISTRIBUTION SUPPORT
Compliance Factor :
IT Responsibility :
Business CC : 000 - CSIG Admin Group
Phone # 888-2917
Fax # 888-0000
Requestor EMail joy.taylor3@gecapital.com
Compliance Officer
Critical Date (mm-dd-yyyy) 12 29 2000
Reason Mod
Strategic Alignment
Approving Manager
Manager's E-Mail ID
Project Description (Short)
Mod to the CPG4 screen
Strategic Explanation

FIG. 18

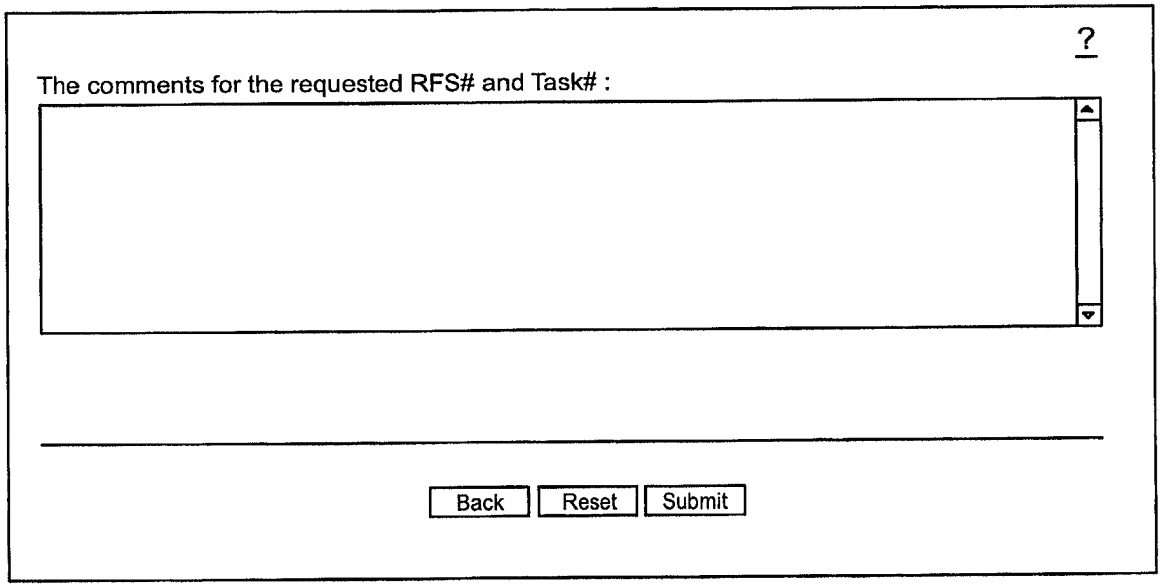
?
The comments for the requested RFS# and Task# :
Back
Reset
Submit

FIG. 19

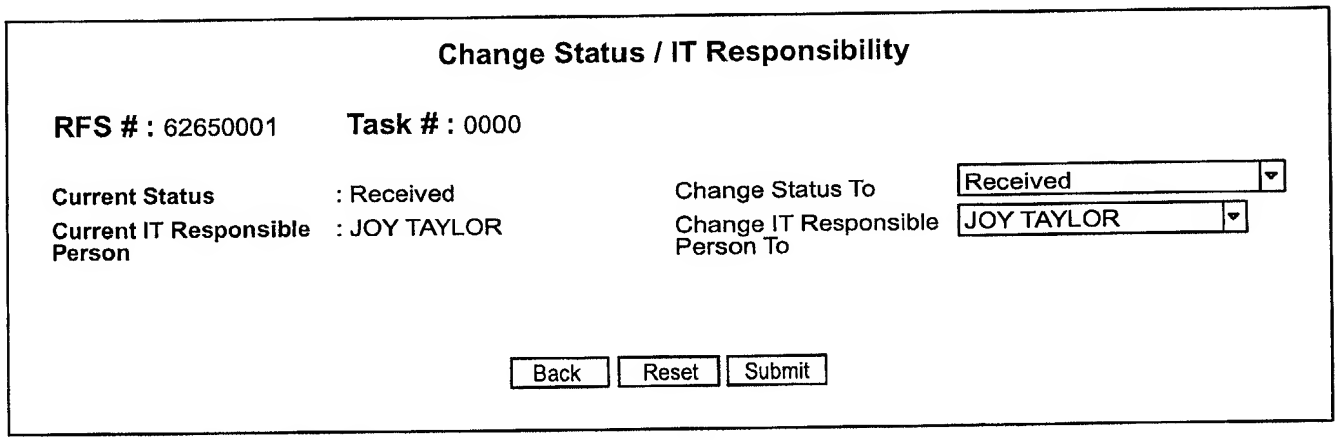
Change Status / IT Responsibility
RFS # : 62650001
Task # : 0000
Current Status
: Received
Current IT Responsible Person
: JOY TAYLOR
Change Status To
Received
Change IT Responsible Person To
JOY TAYLOR
Back
Reset
Submit

FIG. 20

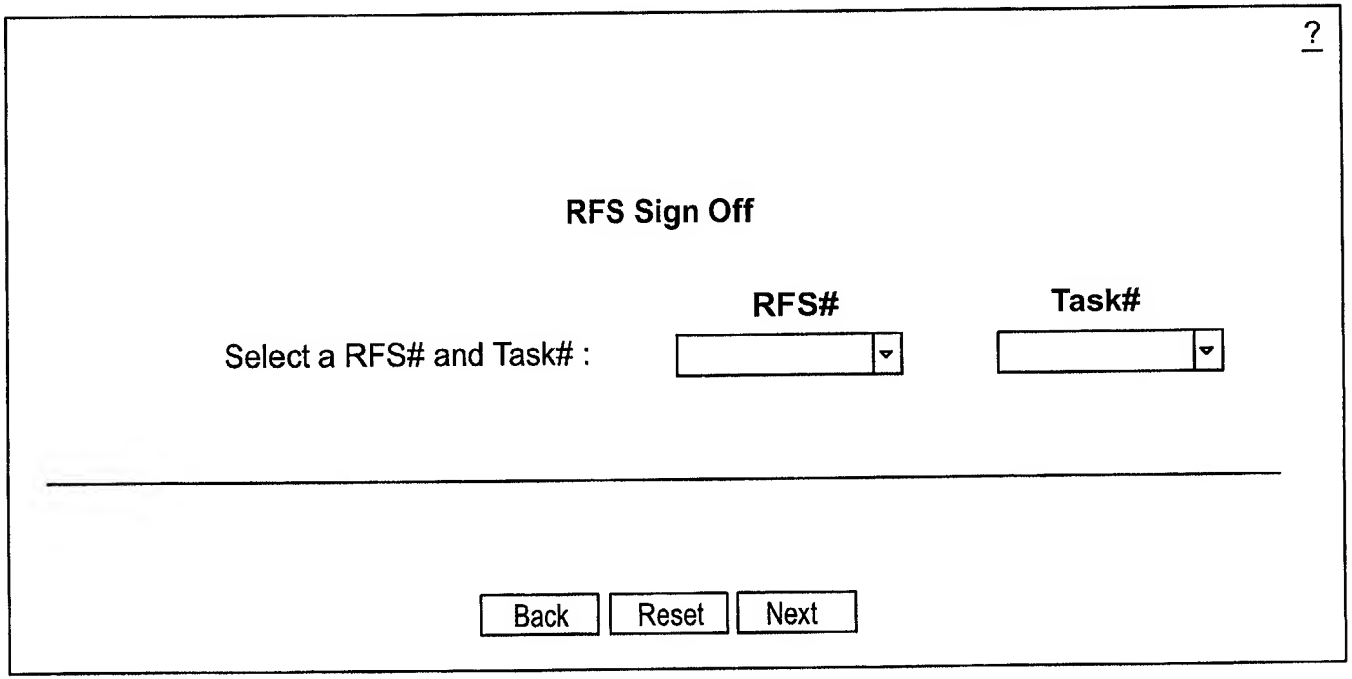

FIG. 21

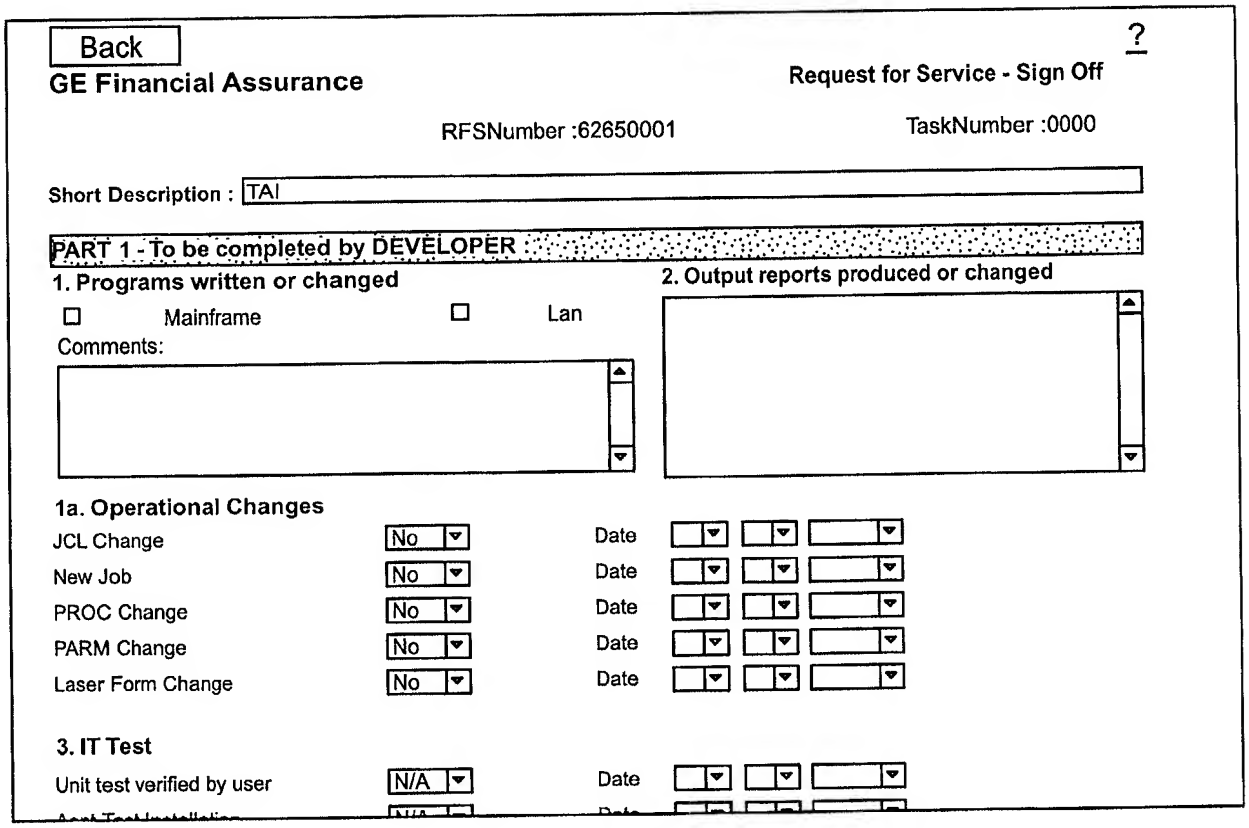
Back
?
GE Financial Assurance
Request for Service - Sign Off
RFSNumber :62650001
TaskNumber :0000
Short Description : TAI
PART 1 - To be completed by DEVELOPER
1. Programs written or changed
Mainframe
Lan
Comments:
2. Output reports produced or changed
1a. Operational Changes
JCL Change
No
Date
New Job
No
Date
PROC Change
No
Date
PARM Change
No
Date
Laser Form Change
No
Date
3. IT Test
Unit test verified by user
N/A
Date

FIG. 22A

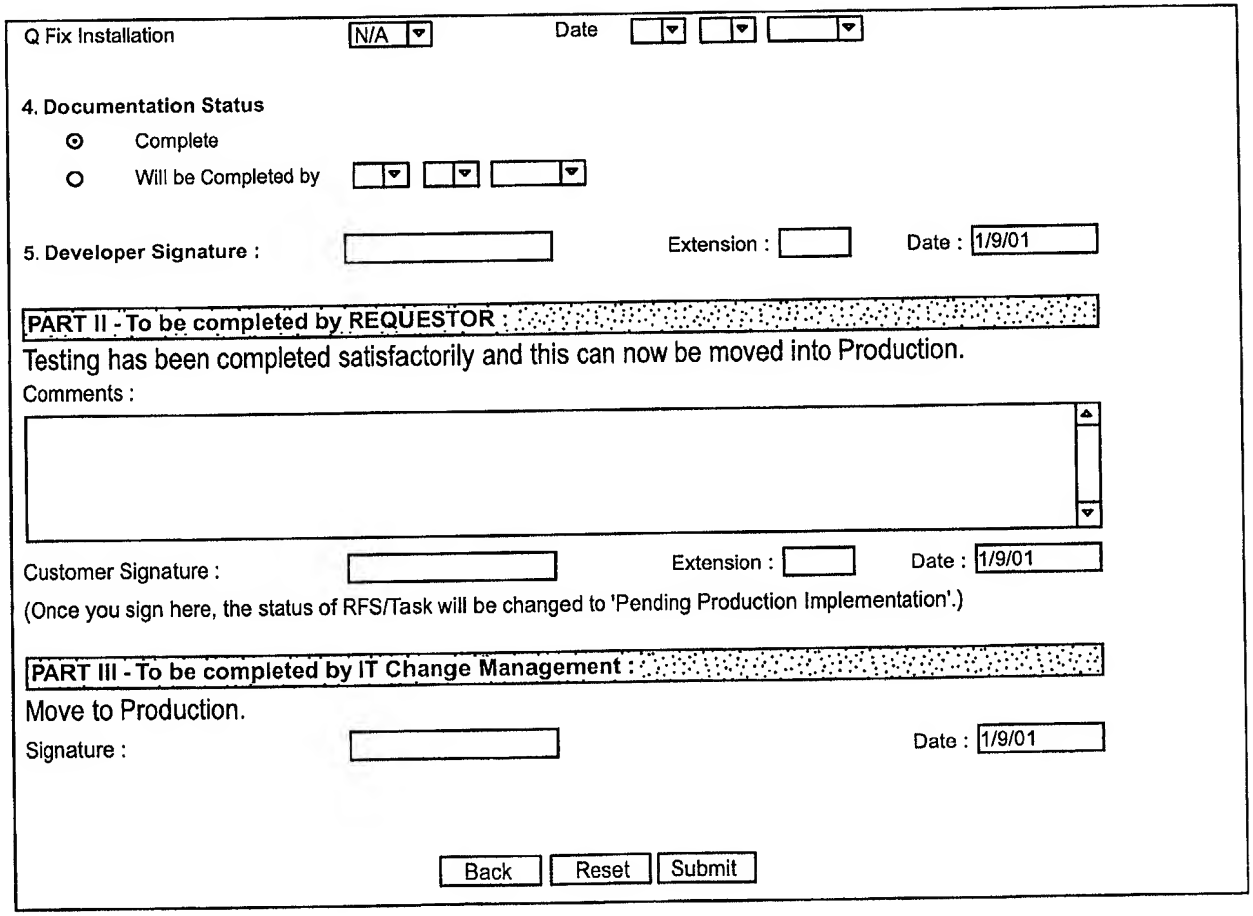
Q Fix Installation
N/A
Date
4. Documentation Status
Complete
Will be Completed by
5. Developer Signature :
Extension :
Date : 1/9/01
PART II - To be completed by REQUESTOR :
Testing has been completed satisfactorily and this can now be moved into Production.
Comments :
Customer Signature :
Extension :
Date : 1/9/01
(Once you sign here, the status of RFS/Task will be changed to 'Pending Production Implementation'.)
PART III - To be completed by IT Change Management :
Move to Production.
Signature :
Date : 1/9/01
Back
Reset
Submit

FIG. 22B

Generate Report | Transfer to Excel | Print Report

To Hide columns, point to field names and click mouse.

RFS#	Task#	Department	Description	Request Type	Application Code	Requestor	Date Received	Cost	Benefit	Weight	Compliance	IT Responsibility	Status	Status Date	Comments Link
50480001	1000	Information Technology	List NIGO and MFU	Quick Hit	PEGA	Taylor,Joy	11/29/00 10:12:07 AM	0	0	99	None	JOY TAYLOR	Assigned	11/29/00 5:12:20 PM	Comments
50480001	6000	Information Technology	test	---	WKMG	Taylor,Joy	11/28/00 2:06:24 PM	0	0	0	---	---	Received	11/28/00 2:06:24 PM	Comments

Home

FIG. 23

RFS					Task			
RFS#	Description	Requestor	Responsible Person	Status	Task #	Description	Responsible Person	Status
00040001	CONVERT LTC ILLUSTRATION	NEWMAN, BRUCE	RWP	RC	N/A N/A			
50759600	SALES ILLUSTRATIONS	ON-CALL SUPPORT	BNM2	RC	N/A N/A			
52500711	3 NSCC VAR ANN PROC PH I	SHONK, CAROLYN	KMM2	AC	1002	5 NSCC ANN- ASSET PRICING	BNM2	CP
					1005	5 NSCC PRICES FILE	BNM2	CN
52600766	5 ADD DVFS VALS/PERF SYS	MOLNAR, MAGGIE	BNM2	AC	N/A N/A			
52600773	5 DVFS ALLOW USER MAINT	MOLNAR, MAGGIE	BNM2	HD	N/A N/A			
54501048	4 CONTACT MNGMT MODS-PFS	WEIR, TOM	BNM2	HD	N/A N/A			
55702544	3TPS CVL+CVLFLEX INT>12%	POLLOCK, TAMMY	BNM2	HD	N/A N/A			
55702551	0 PROD COMMONWLTH XTRA 99	COLEMAN, SUSAN	KMM2	HD	1003	3 PROD XTRACRED-FUND PERF	BNM2	CP
55702636	3 PROD COMVA 99 NY 1 YR DB	SHAHINIAN, C	SLC	AC	1003	3 PROD COMVA99-FUND PERF	BNM2	CN

FIG. 24

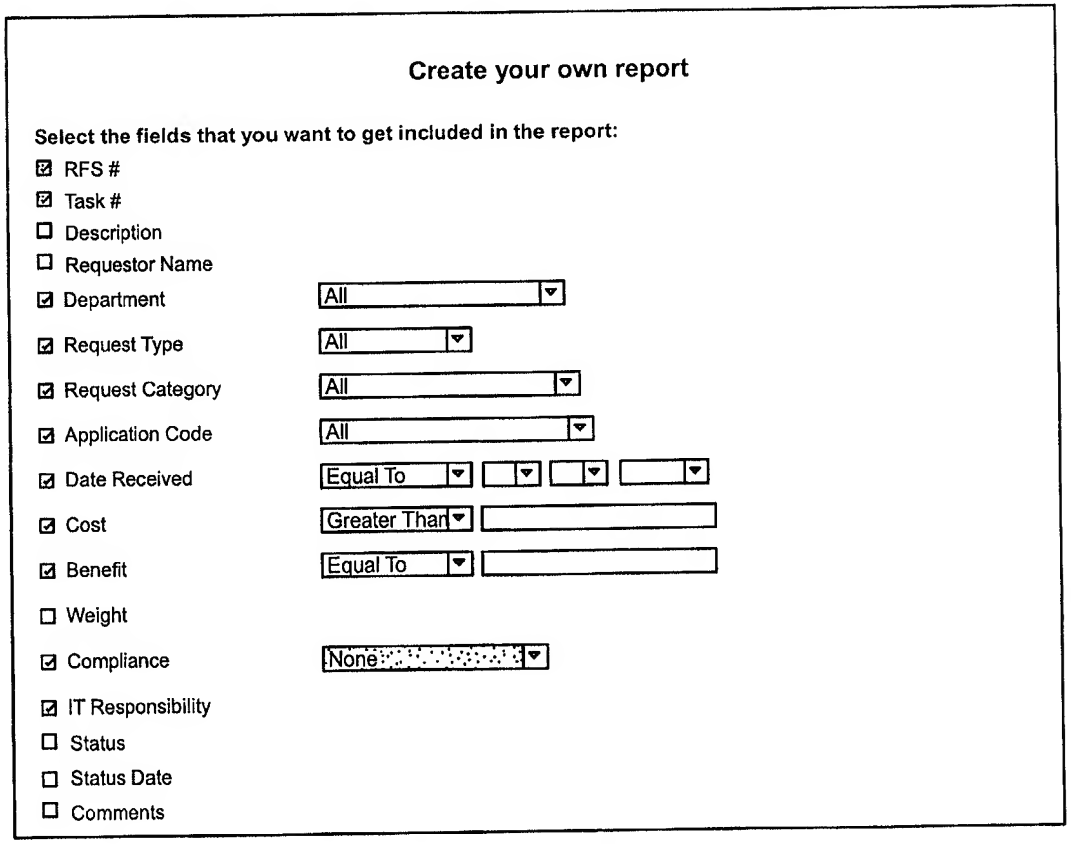
Create your own report
Select the fields that you want to get included in the report:
RFS #
Task #
Description
Requestor Name
Department
All
Request Type
All
Request Category
All
Application Code
All
Date Received
Equal To
Cost
Greater Than
Benefit
Equal To
Weight
Compliance
None
IT Responsibility
Status
Status Date
Comments

FIG. 25

T0821T" E9282001

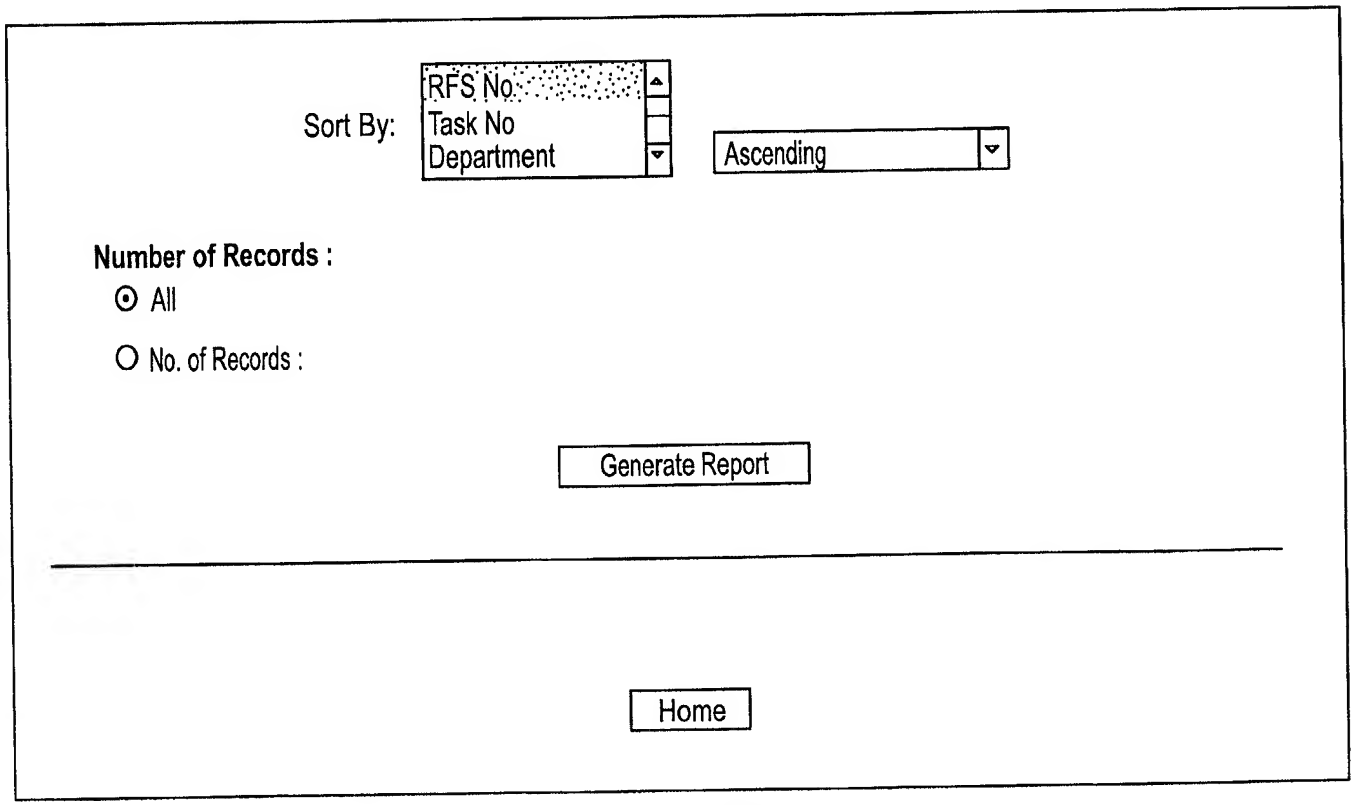

FIG. 26

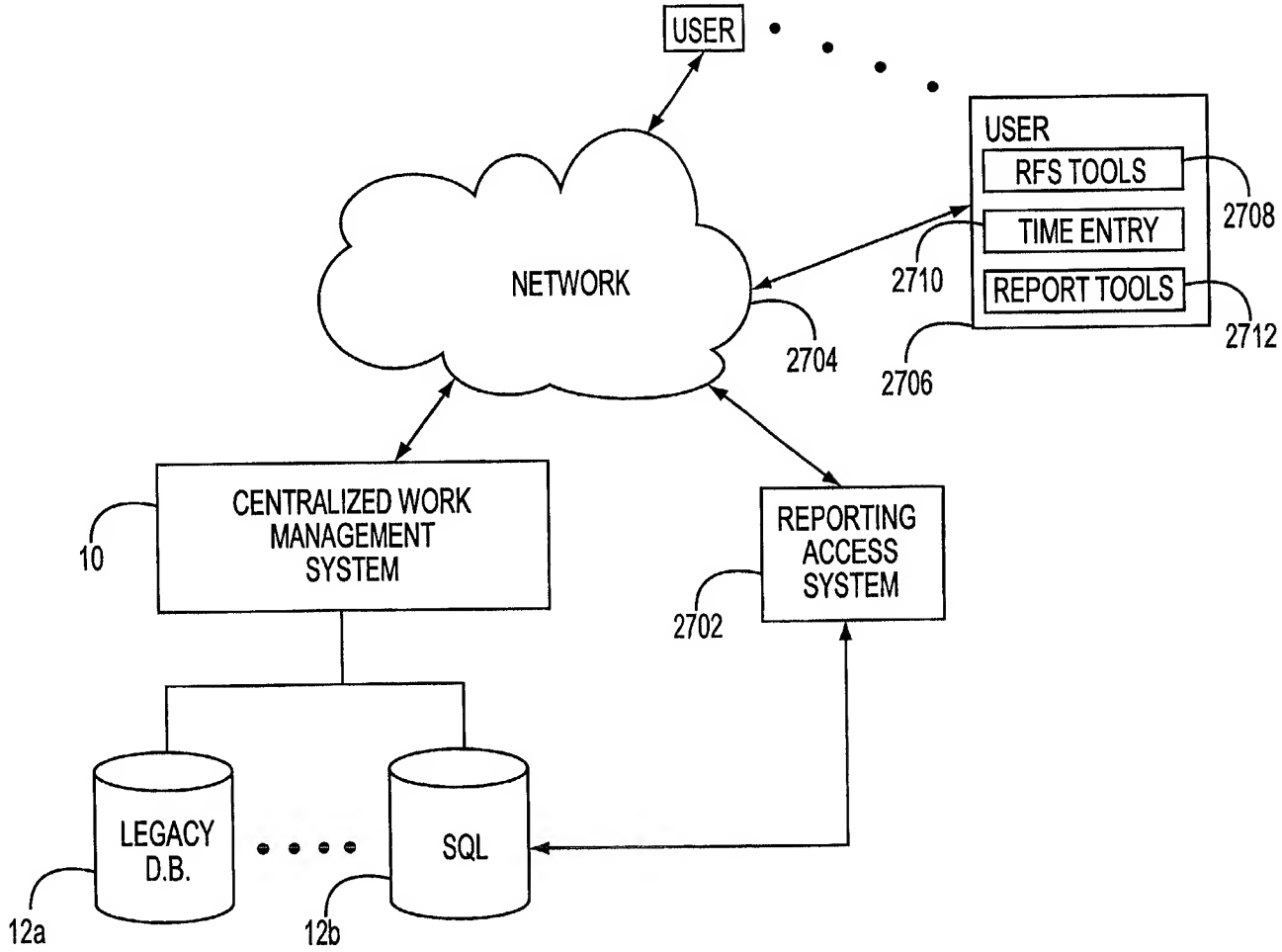
USER
USER
RFS TOOLS
TIME ENTRY
REPORT TOOLS
2708
2710
2712
NETWORK
2704
2706
CENTRALIZED WORK MANAGEMENT SYSTEM
10
REPORTING ACCESS SYSTEM
2702
LEGACY D.B.
SQL
12a
12b

FIG. 27